

Instructions to Capture Your Estate

Prologue:

Before beginning this process, it is critical to maintain detailed records of all communications and filings with the IRS and any other agencies involved.

Keep copies of all forms submitted (including Form 56 and EIN application materials).

Record dates, times, names of agents spoken to, and summaries of phone conversations.

Use certified mail with return receipt for any important documents you send by mail.

Organize everything into a secure file — this will serve as evidence of your actions and protect your standing as Executor of your estate.

Patience and precision are key: allow proper time for filings to be received and processed before moving to the next step.

1. File Form 56 with the IRS by mail.

Send it to the address where you would normally file your tax returns.

(Example of completed Form 56 to be added later.)

2. After about a week (giving the IRS time to receive the Form 56), claim your estate by acquiring an Estate EIN.

Call the IRS to confirm they received your Form 56.

Begin the process of applying for an Estate EIN.

Understand that during this step, you will be relinquishing the use of your Social Security Number (SSN) for estate matters.

The Estate EIN will allow you to build a trust under your estate, which holds superior standing over any associated trusts.

As Executor of your own Estate, you are establishing the highest lawful authority and standing available.

3. Call the IRS Business Line to confirm your original Sole Proprietor EIN.

When the IRS created your entity, they also created a default Sole Proprietor EIN linked to it.

You must call the IRS Business Line specifically (not the general line) to inquire and confirm this EIN.

Be clear that you are requesting information regarding the EIN associated with your entity, not creating a new one.

4. Use your Sole Proprietor EIN to back your Estate with the State and register a DBA (Doing Business As).

After confirming your Sole Proprietor EIN, use it to register your entity with the State.

File for a DBA (Doing Business As) to formally establish your authority over the Estate.

Suggested DBA format: [YOUR NAME IN ALL CAPS] PRIVATE BANKER - ESTATE & TRUST (or something similar that asserts your standing and role).

You are free to choose another style of DBA, but it is wise to select a title that clearly expresses control, trust authority, and private capacity.

5. Complete a Passport Change Form to update your occupation to "Minister."

File a Passport Change Form and update your listed occupation to Minister.

"Minister" is a recognized standing covering finance, ecclesiastics, and other areas of administration.

Simply state the change — do not ask permission or provide unnecessary explanations.

6. Update all vehicle, trailer, boat, and motorcycle titles at the DMV to reflect your Estate name.

Visit the DMV and update the title certificates for all your vehicles and movable property.

Titles must reflect the name assigned to you by the IRS: [ALL CAPS NAME] ESTATE.

This officially moves the assets under the ownership of the Estate, making it simple to list them as assets within your Estate Trust.